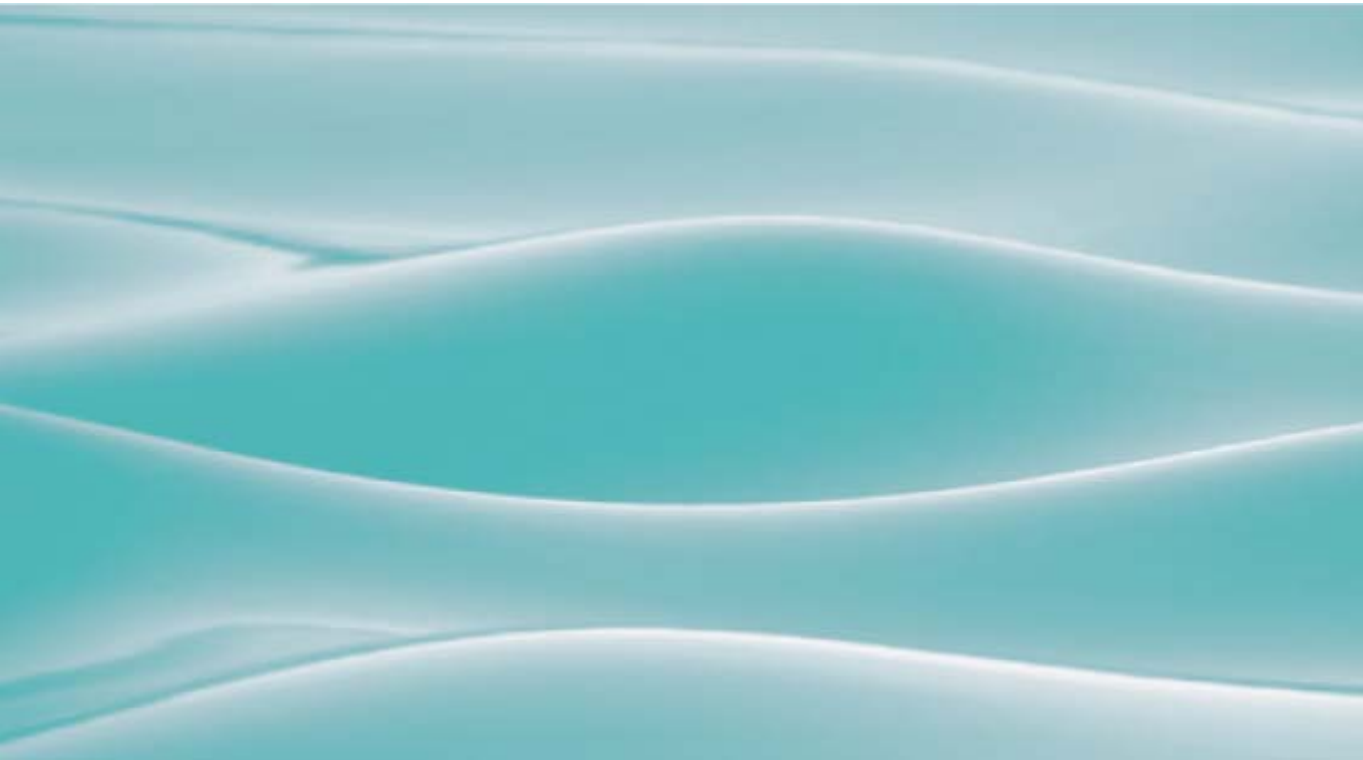


Challenges for the inland shipping industry

From a western

European perspective

ebu



Challenges for the inland shipping industry

From a western european perspective



Ton Roos

Netherlands Rhine and Inlandshipowners
Association
General manager

European Barge Union
Member of the board

World

A world map with a teal background and white wavy lines. The landmasses are colored in a dark red or maroon hue. A small blue dot is placed on the western coast of Europe, specifically in the Netherlands, to indicate the location of Rotterdam. The word 'Rotterdam' is written in a black, sans-serif font, underlined, and positioned to the left of the dot.

Rotterdam

Europe



Rotterdam



The Netherlands



Rotterdam





European Barge Union



Founded in 2001

Seat in Brussels

Office in Rotterdam

Members:

Inland shipping branch-associations from:

Germany

France

Switzerland

Belgium

Austria

The Netherlands

Netherlands Rhine and Inlandshipowners' Association (CBRB)



- 400 members
- member groups:
 - containers
 - petrochemicals
 - dry bulk
 - passengers
 - towing/special transport

Inland shipping in Europe

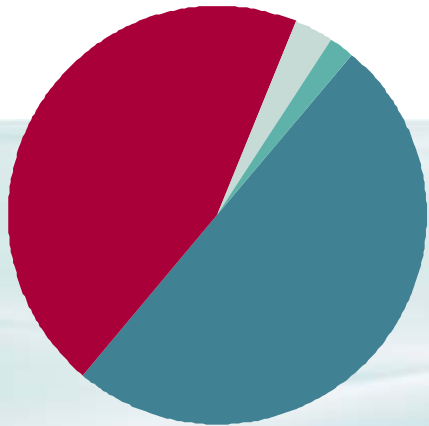


- Total transportvolume: 130 billion tonne/kilometres
 - 400 mio tonnes (estimate 2001)
- Modal split in total : 7% (1998)
- Modal shift for inland shipping much higher in NW-Europe:
- Germany : 16,5%
- The Netherlands : 54,4%
- Belgium: : 11,3%

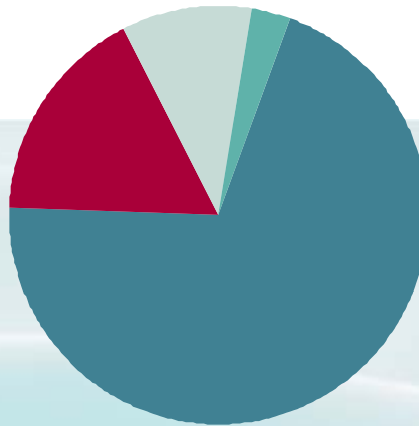
Modal split tonnes/km



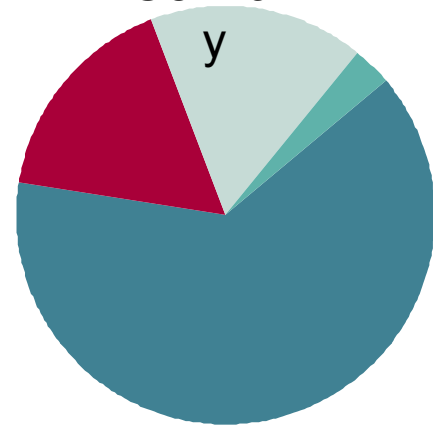
Netherlands



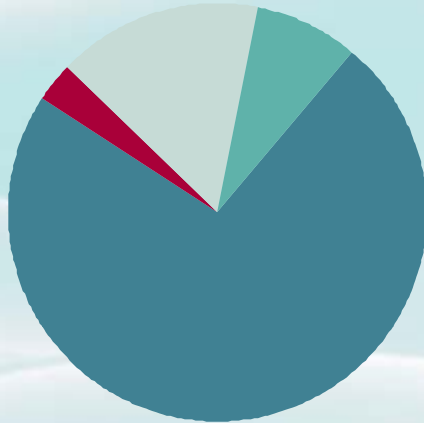
Belgium



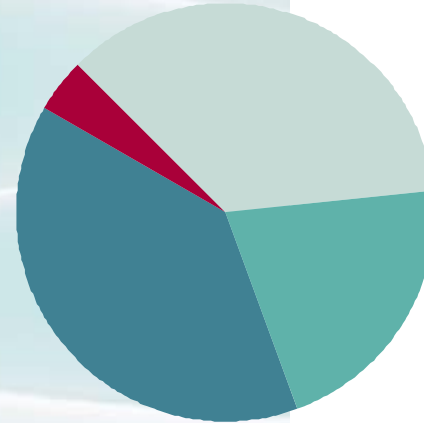
Germany



France



Austria



Inland Nav. Railcargo Roadtransport Pipeline

Source Eurostat 1997

Inland shipping in Europe

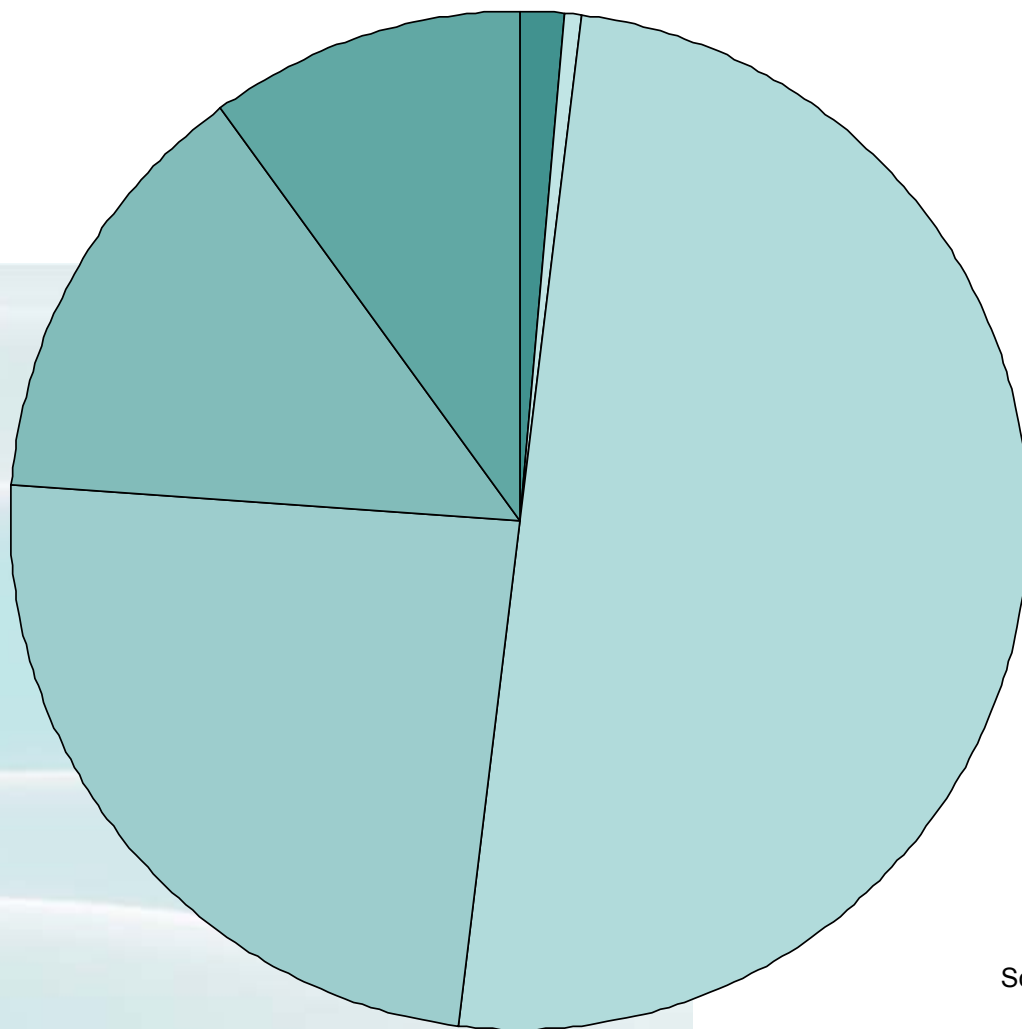


- 31% of all intra-european continental transport by inland shipping
- Other mode which is very important is short sea shipping for countries like the UK, Ireland and Scandinavia (modal split 41%)

Nationality Fleet Inland Shipping

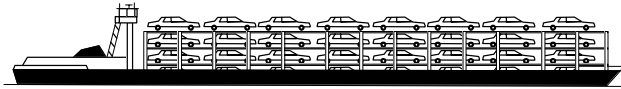


Switzerland	1.5
France	10
Belgium	15
Germany	24
Netherlands	50
Other	0.5



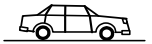
Source CBS

Shiptypes Inland Shipping

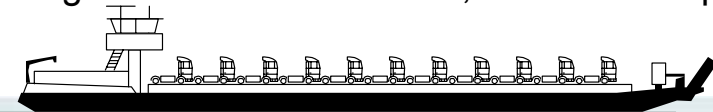


CAR TRANSPORTATION SHIP

length 110 meter - Width 11,40 meter – depth 2,20 meter - draught 600 ton

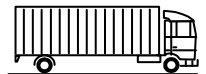


600X



RO-RO SHIP

length 110 meter - width 11,40 meter - depth 2,50 meter

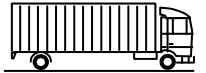


72X

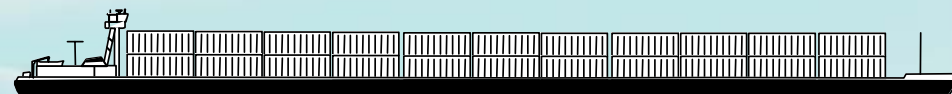


CONTAINERSHIP

length 110 meter - width 11,40 meter - depth 3,00 meter - draught 200 TEU*

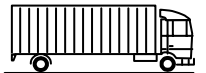


200X



CONTAINERSHIP JOWI-CLASS

length 135 meter - width 17 meter - depth 3,00 meter - draught 470 TEU*

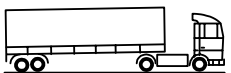


470X



PUSH BARGE / 4

width 193 meter - width 22,80 meter - depth 2,50/3,70 meter draught 11.000 ton



440X

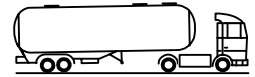
* 1 TEU = 1"20-feet" container

Shiptypes Inland Shipping



TANKER

length 110 meter - width 11,40 meter - depth 3,50 meter - draught 3000 ton



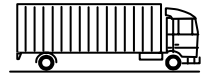
120X

SMALL CHANNEL VESSELS:



NEO KEMP / SMALL CONTAINER VESSEL

length 63 meter - width 7 meter - depth 2,50 meter - draught 32 TEU *



32X

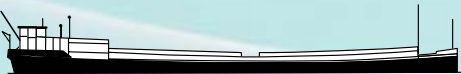


SPITS

length 38,50 meter - width 5,05 meter - depth 2,20 meter - draught 350 ton

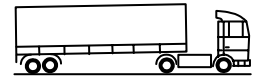


14X



KEMPENAAR

length 63 meter - width 6,60 meter - depth 2,50 meter - draught 550 ton

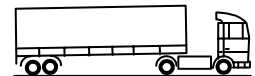


22X



DORTMUNDER

length 67 meter - width 8,20 meter - depth 2,50 meter - draught 900 ton



36X

Shiptypes Inland Shipping



Challances for the inland shipping industry

Shiptypes Inland Shipping



Challances for the inland shipping industry

Shiptypes Inland Shipping



Challances for the inland shipping industry

Shiptypes Inland Shipping



Challances for the inland shipping industry

Shiptypes Inland Shipping



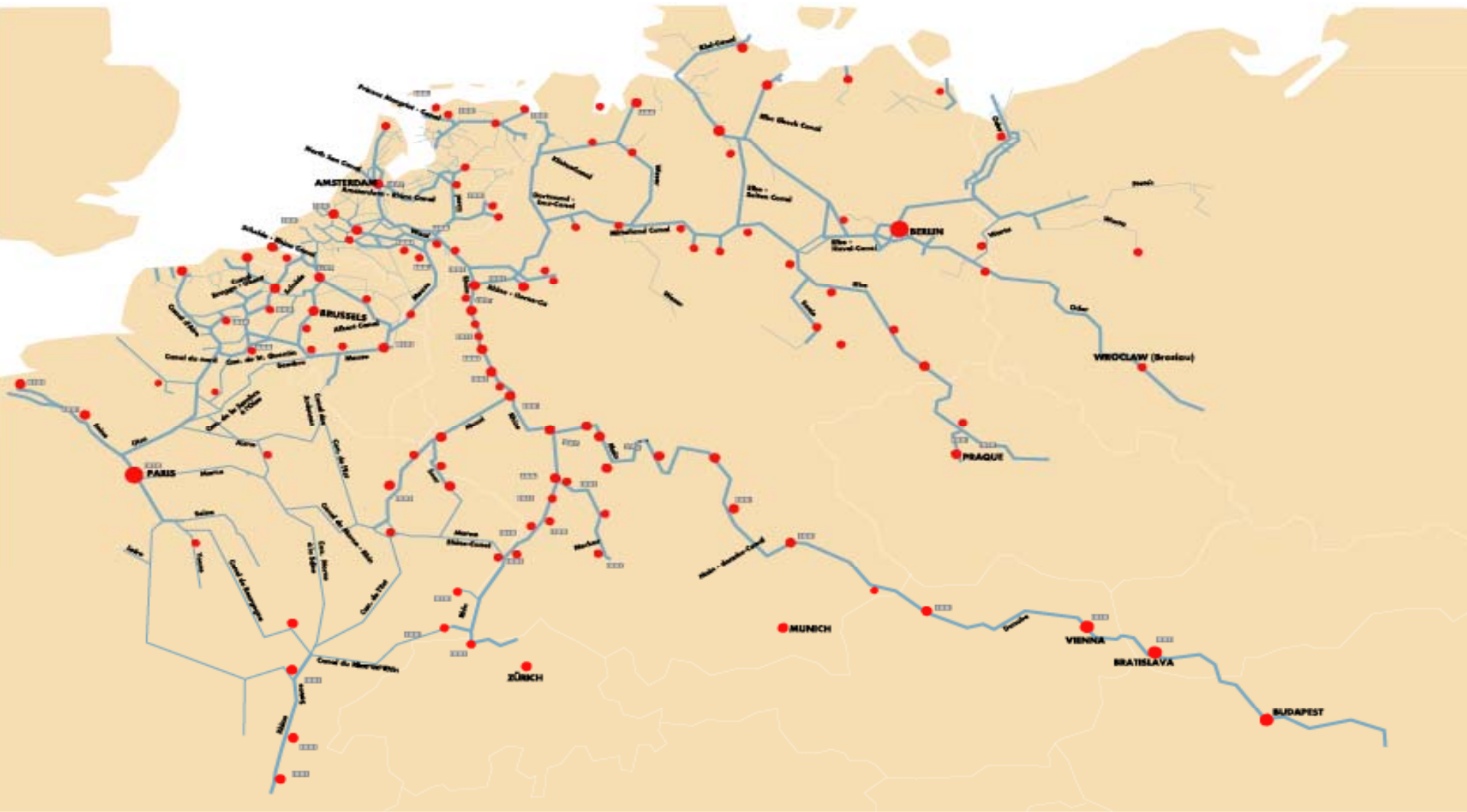
Challances for the inland shipping industry

Some history



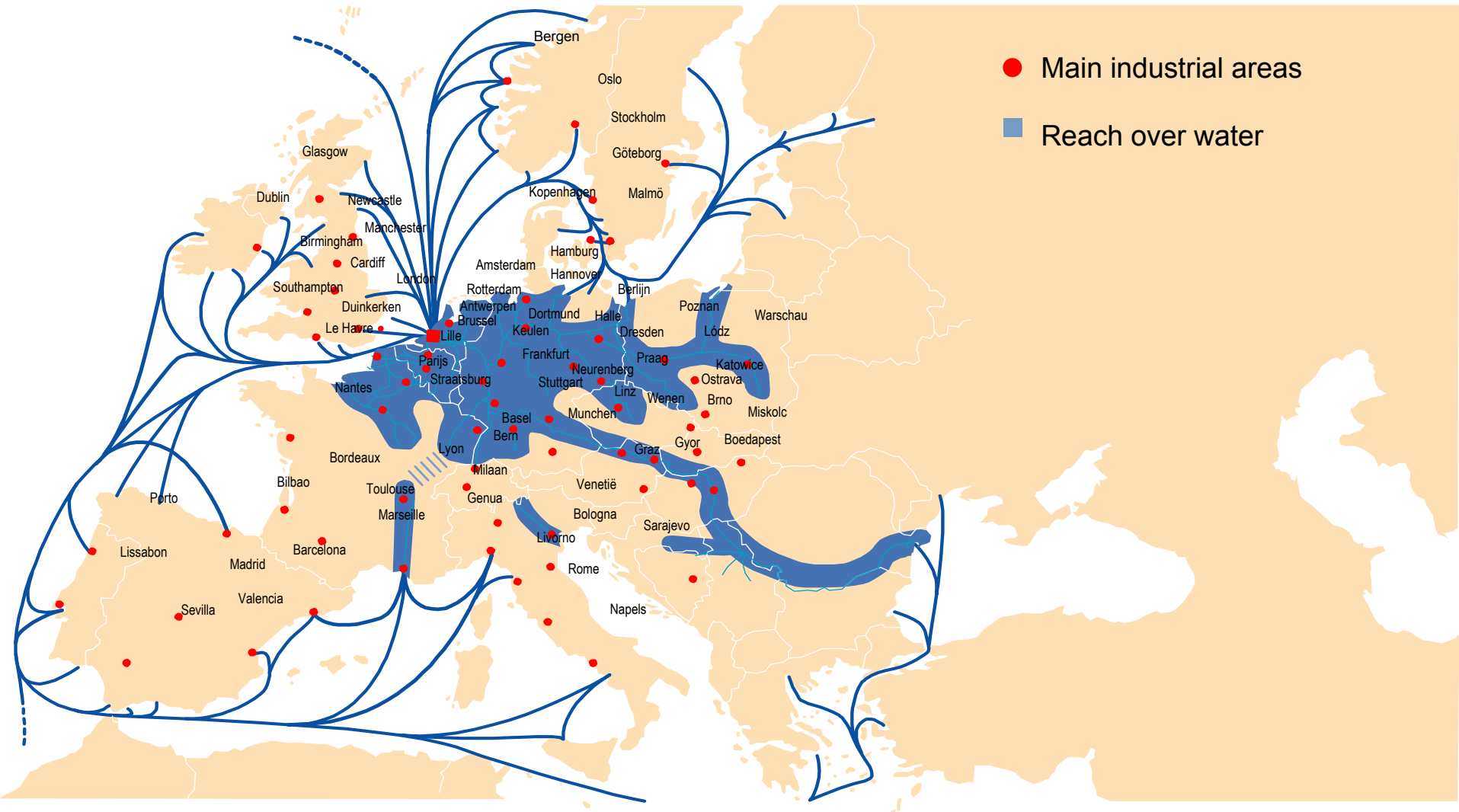
- 1874: Treaty of Mannheim/
– liberalized transport on Rhine
(80%)
- from 1930 to 2000: north-south:
strict market controls
- Since 2000 finally a free market
(20%)

Waterways / Logistical Centers



Challances for the inland shipping industry

Reach of Inland Navigation- short sea



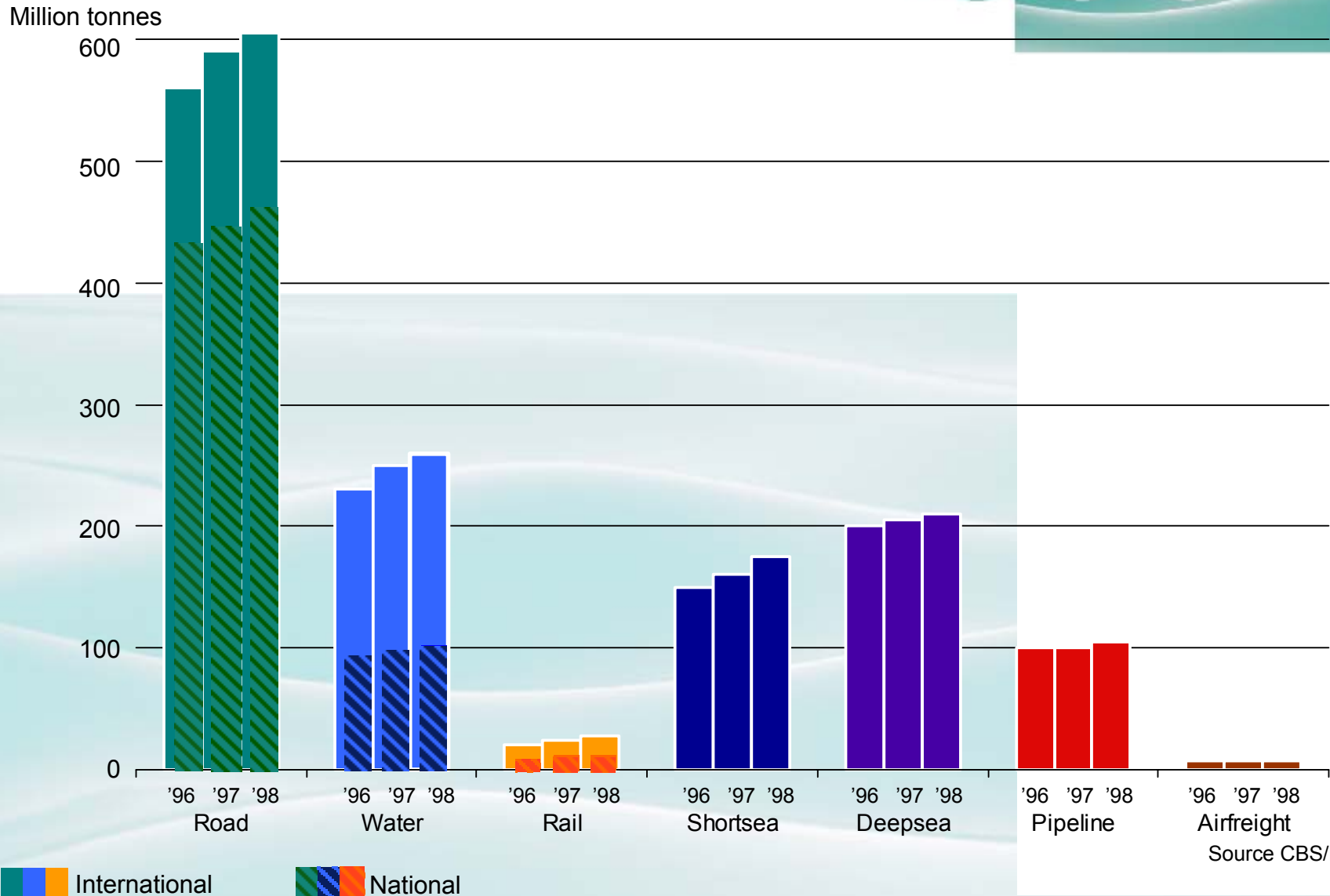
Challances for the inland shipping industry

Connections with the hinterland



- ARA-ports: inland shipping via Rhine, Meuse and canals:
- Up to 80% of dry bulk and fuels
- Up to 60% of petro-chemicals
- Almost 40% of all containers
- North Germany: railways /highly subsidized
- France: railways/ highly subsidized

**Modal split: cargo and modalities
(in milion tonnes) 1996 - 1998**



Source CBS/DGG 1999

Containerboom on the inland waterways



- In a sceptical environment
- Shippers/carriers/politicians: future is for rail...
- 1970: inland containershipping almost zero
- 2000: 3,5 mio TEU
- growth pro year: > 10%
- EU: 50% growth before 2007
- Rotterdam modal split:
 - Rail12%
 - Barge: 35-40%... will grow to **50%**
- ± 50 containerterminals
- private, local initiatives

This presentation is offered to you by:



Netherlands Rhine and Inland Shipowners'
Association (CBRB)



Europe Combined Terminals (ECT)



Port of
Rotterdam

Rotterdam Municipal Port Management (RMPM)



Rotterdam Mainport Containers



ROTTERDAM

MAINPORT CONTAINERS

*For container transport
with unequalled potential*

Discover it yourself !

Containers . . .

CONTAINERS

How do you get them to / from the right address in Europe in a reliable, efficient and environmentally-friendly way ?



Rotterdam Mainport Containers

By . . .

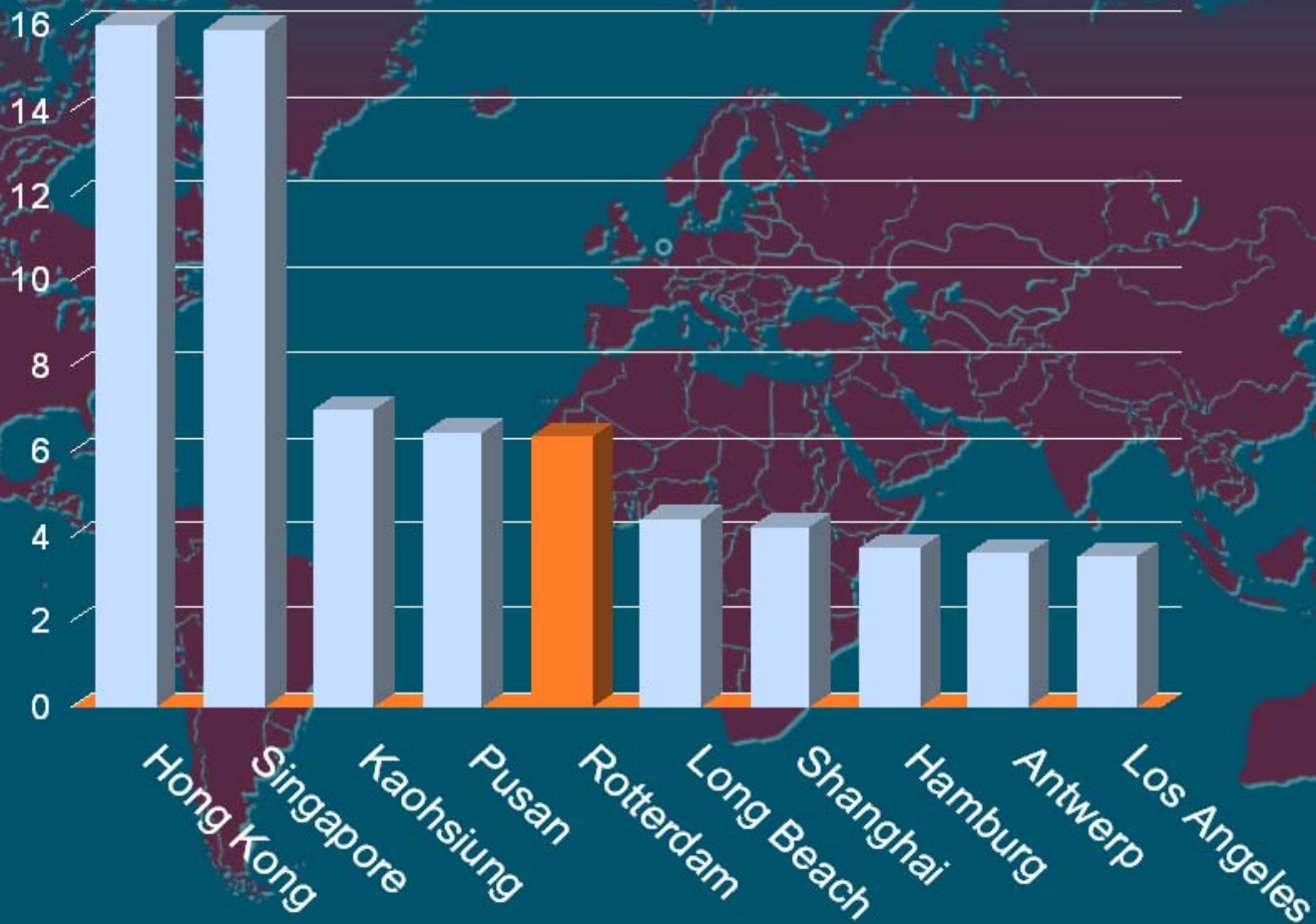
Inland container shipping via the port of Rotterdam



Rotterdam Mainport Containers

World container ports, 1999

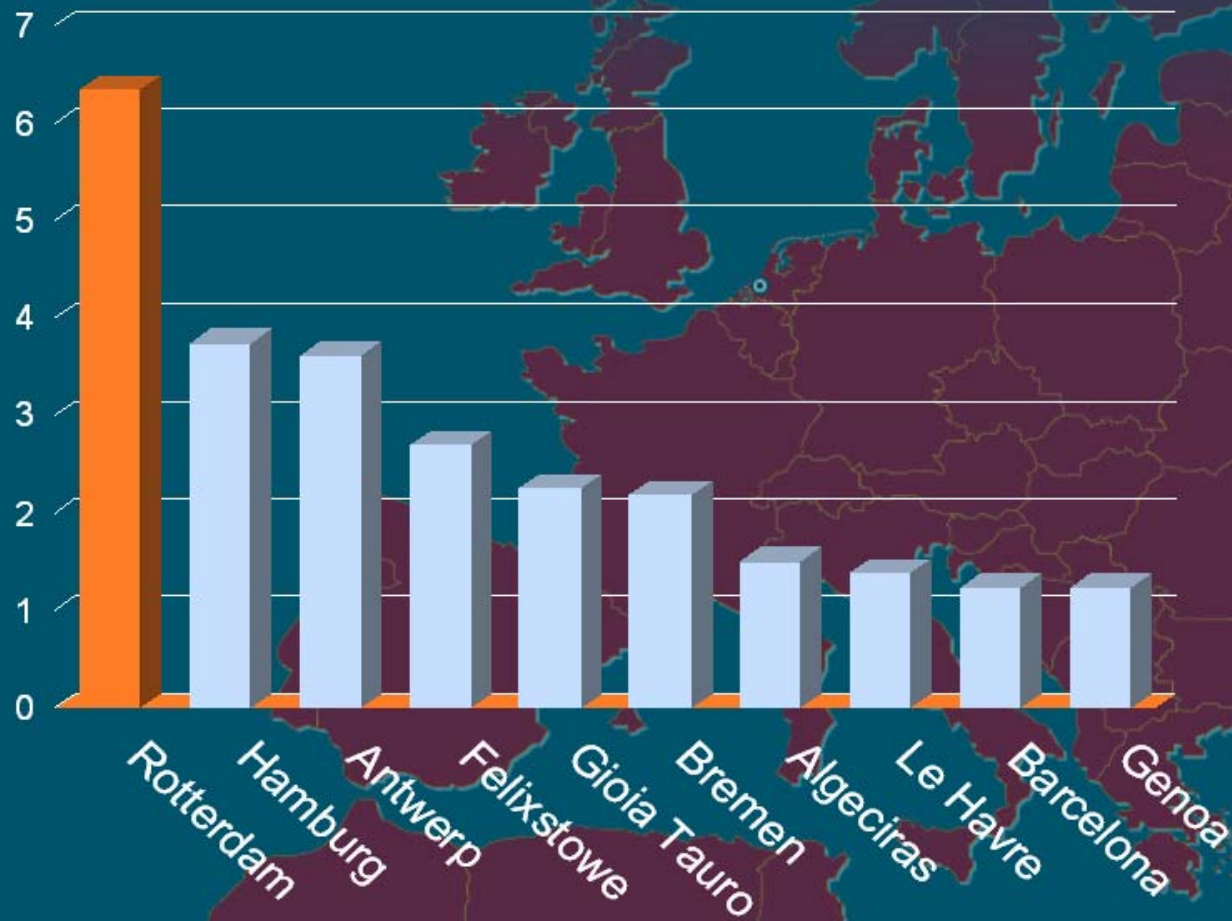
Unit: Number x 1 million TEU's



Rotterdam Mainport Containers

European container ports, 1999

Unit: Number x 1 million TEU's



Rotterdam Mainport Containers

Rotterdam is linked by inland waterways to the farthest corners of the continent



Rotterdam Mainport Containers

Rotterdam advantages

- ① Strategically located in Europe
- ② 350 million customers within reach
- ③ Near industrial areas
- ④ Multi-user and dedicated container terminals
- ⑤ First / last port of call
- ⑥ Capable of handling 7th generation vessels
- ⑦ Specialized distribution companies
- ⑧ The latest communication technology
- ⑨ Multimodal transport facilities



Rotterdam Mainport Containers

Rotterdam advantages (4 - 6)

ECT Delta terminal



Rotterdam Mainport Containers

- ④ Multi-user and dedicated container terminals
- ⑤ First / last port of call
- ⑥ Capable of handling 7th generation vessels

Rotterdam advantages (4 - 6)

Maersk / Sea-Land



Rotterdam Mainport Containers

- ④ Multi-user and dedicated container terminals
- ⑤ First / last port of call
- ⑥ Capable of handling 7th generation vessels

Rotterdam advantages (7)

Distriparks adjacent to container terminals

Distripark Maasvlakte

Distripark Botlek

Distripark Eemhaven



Rotterdam Mainport Containers

⑦ *Specialized distribution companies*

Rotterdam advantages (9)

Excellent, reliable and flexible distribution network to / from the hinterland

Inland shipping

Rail

Road

Shortsea



Rotterdam Mainport Containers

⑨ *Multimodal transport facilities*

Inland shipping

- Reliable
- Efficient
- Environmentally-friendly
- Lowest transport costs per ton / kilometer
- Numerous sailings 24 hours per day, 7 days a week
- Dense network of inland waterways and terminals



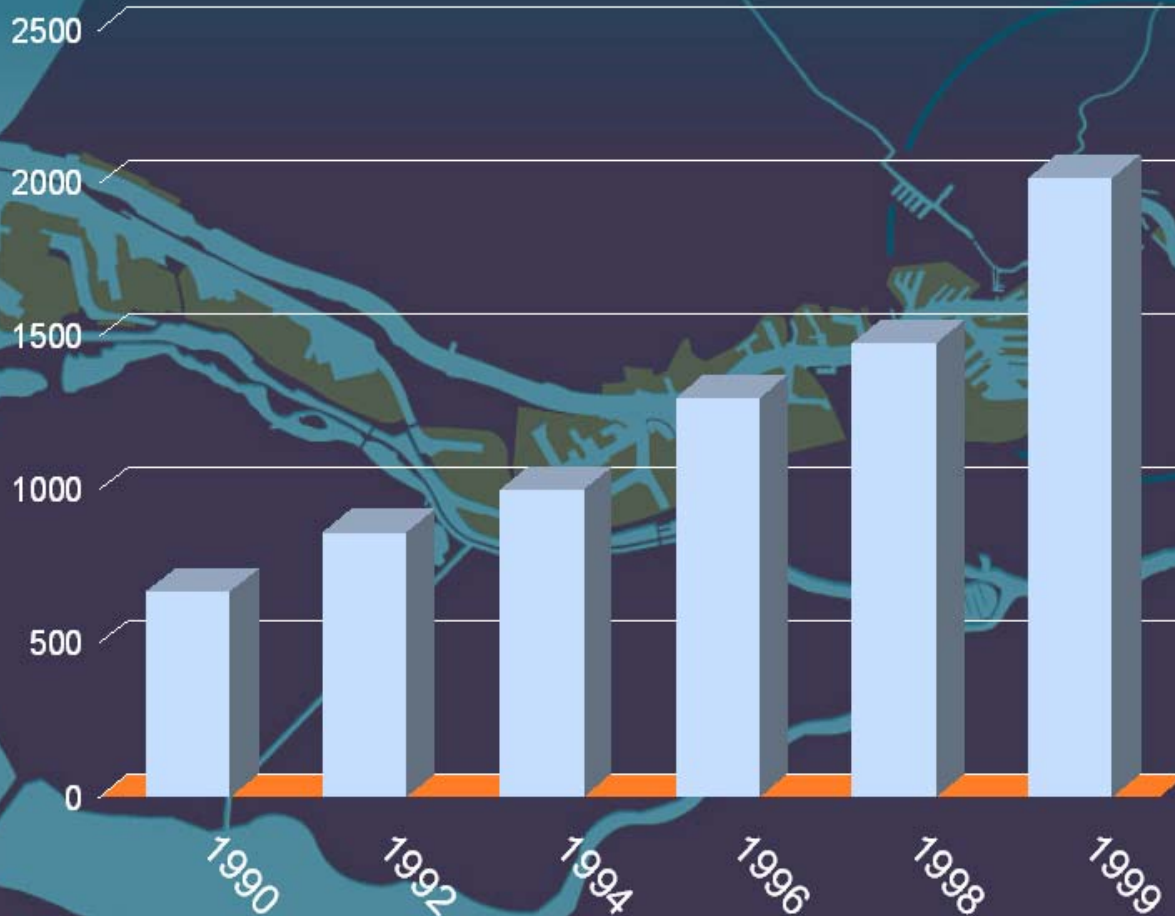
Rotterdam Mainport Containers

Inland shipping



Rotterdam Mainport Containers

Volumes handled by inland shipping in the port of Rotterdam (Unit: Number x 1000 TEU's)



Rotterdam Mainport Containers

Examples inland container vessels



1 inland container vessel: 60 up to 500 containers



1 push-barge combination: 385 to more than 500 containers



1 quadruple push-unit: more than 500 containers



This success gets followers



- Belgium: inland 75.000 TEU in 1998
162.500 TEU in 2000
- France: growth on river Seine and Rhône
yearly by double digits
- New canal planned:
expected growth: 400%

This success gets followers



- European Union: 3.191.100 km²
- 375 mio inhabitants
- 117,5 persons per km²

- USA: 9.629.100km²
- 270 mio inhabitants
- 28,5 persons per km²

Europe vs USA:

More people / less space



- That means:
 - Much more problems with transport
 - Much more congestion on the roads
 - Less space
 - More environmental awareness
 - Mood against more asphalt



European Commission



WHITE PAPER

**European transport
policy for 2010:**

Time to Decide

Brief presentation

September 2001



Directorate-General for Energy and Transport

Information - Communication



Issues

The growing conflict facing transport:



Increasing
demand for
mobility



Worsening congestion
Poor quality services
Damage to the environment
Safety being challenged
Isolation of some regions

Economic importance of the sector:



Total expenditure around €1000 billion in the Union
Generates over 10% of Union GDP
Employs over 10 million people





Shifting the balance between modes





Linking up sea, inland waterways and rail

Developing “motorways of the sea”

An alternative to land

Sea links providing a way around bottlenecks, such as in the Alps or the Pyrenees, need to become trans-European networks and receive support.

Offering innovative services

This calls for an efficient port service: in February 2001 the Commission proposed rules on access to the market in port services.

Sea:

- simplify the rules on how ports operate
- bring all the players together in a one-stop-shop

We still need to

Inland waterways:

- establish links to rivers and install transshipment equipment
- standardise the technical specifications
- harmonise pilots' certificates and rest periods
- create navigational aid systems





Intermodality



The new Marco Polo programme

- special emphasis on short-sea shipping
- start-up aid for new logistical services
- improvement of the intermodal chain
- innovation in cooperation and dissemination of good practice

+ revision of the 1997 guidelines on State aid to maritime transport

Will replace
PACT end 2001
**€30 million
per year**

Creating favourable technical conditions

Encouraging the emergence of freight integrators

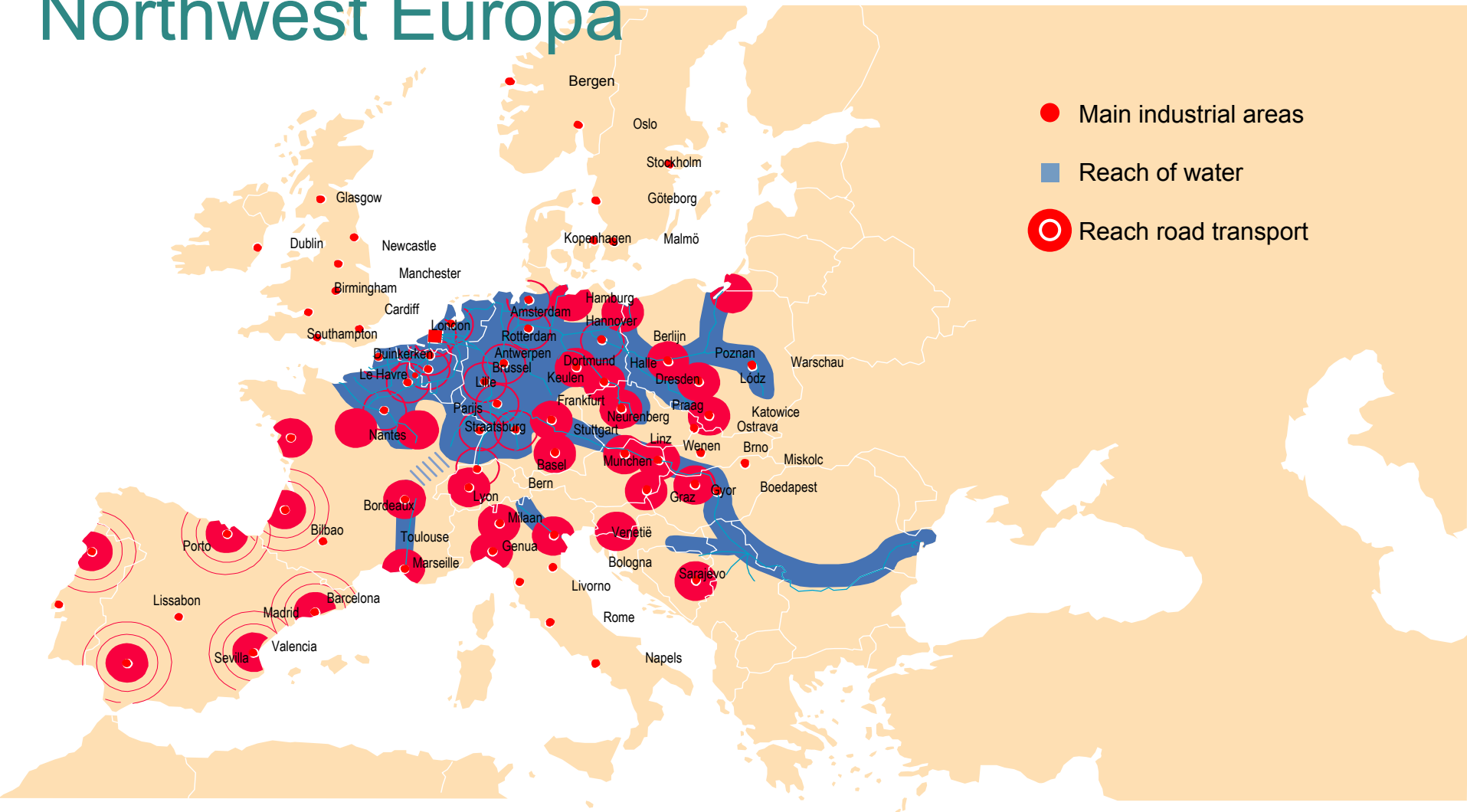
Integrated transport of loads >5 tonnes
Proposal in 2003 to define responsibilities all along the transport chain, with corresponding documents.

Standardising containers and swap bodies

Shipping containers are narrow, swap bodies are fragile. Proposal to harmonise loading units in 2003.



Reach of Combined Road-watertransport Northwest Europa



Challances for the inland shipping industry



The trans-European networks

Road and rail networks: bottlenecks

Delays in the TEN programme

Only 20% of the infrastructure planned under the TEN programme has yet been built.

Why?

- inadequate funding
- lack of cross-border priority

A partial revision in 2001

- concentration on the planned infrastructure
- new projects to relieve blockages, corridors giving priority to freight, HST-air integration
- increase from 10 to 20% of financing for rail bottlenecks at natural barriers and at borders with the candidate countries.

A major overhaul in 2004

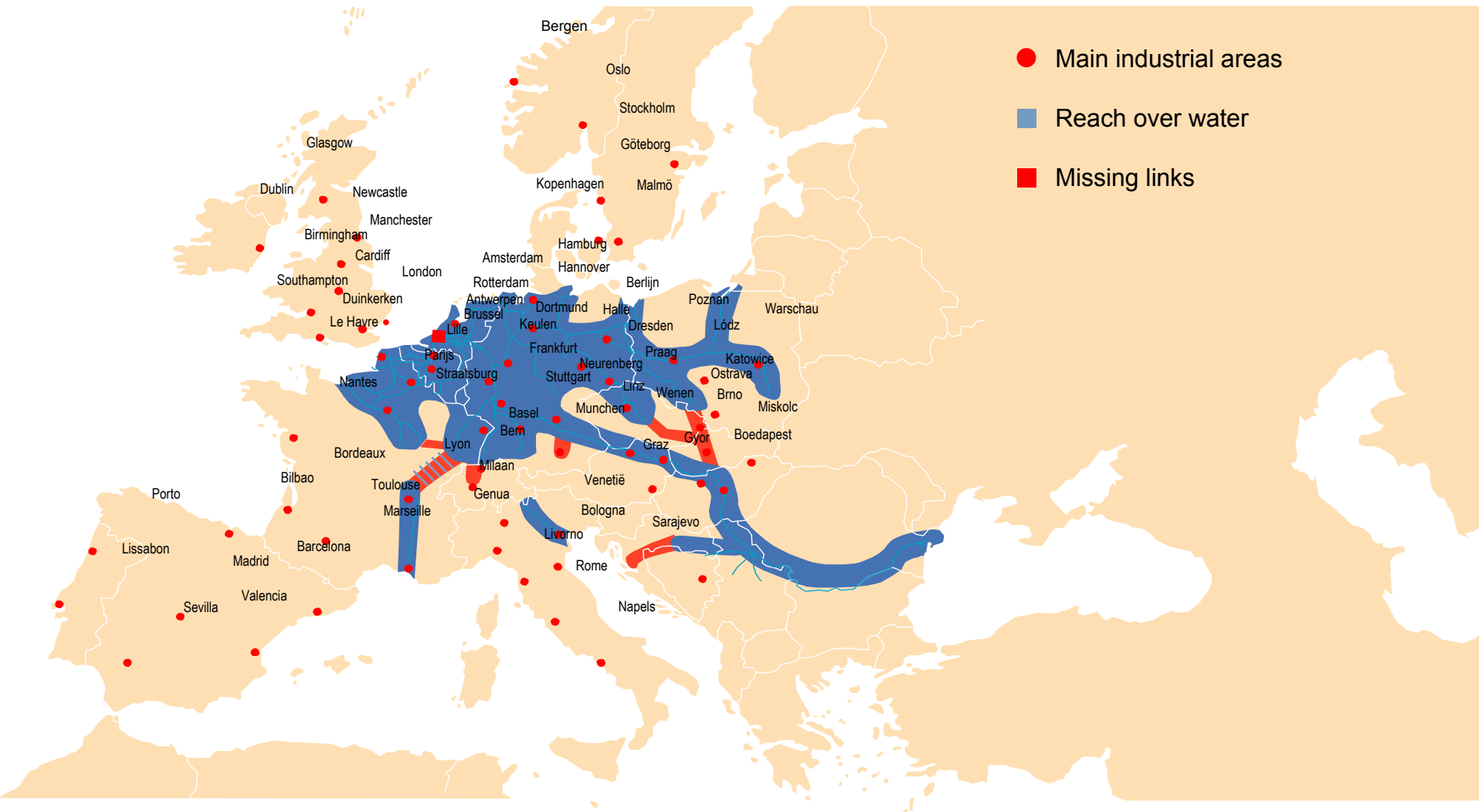
Integration of the candidate countries' stretches of pan-European corridor, motorways of the sea, airports and links with outlying regions.



Directorate-General for Energy and Transport

Information - Communication

Reach of European waterways + missing links



Challenges for the inland shipping industry



The headache of funding



Limited public budgets

National
focused on national
projects

Community
more selective and
conditional

Reassuring private investors

By:

- introducing greater flexibility into public contracts
- clarifying the rules on concessions
- encouraging the creation of single bodies responsible for obtaining and utilising funding.

An innovative approach: pooling of funds

Principle

Part of the revenue from charging for existing infrastructure is used to finance missing links in the corridor concerned (e.g. another mode)

- **Means adapting Directive 99/62** to allow tolls to cover costs other than those of constructing, operating and developing the road network concerned

Potentially applicable to the Lyon-Turin combined transport/HST line





Towards gradual charging for the use of infrastructure



A price structure that reflects costs

Ideal cost of using infrastructure = maintenance and operating costs + external costs: accidents, pollution, noise, congestion

But at present ...

Costs/charges for heavy goods vehicle travelling 100 km on a toll motorway with little traffic

Total costs
€8-36

Current average charges
€12-24

A Community framework is needed

The Commission plans to propose in 2002:

- **A framework directive on the principles of charging** for the use of infrastructure and on a pricing structure, along with a common methodology for charging to incorporate external costs, and conditions to ensure fair competition between modes.
- **a directive on the interoperability** of tolls on the trans-European road network



Inland Shipping:



- Good chances for the future
- but much work to be done:
- No real Trans European network for inland shipping
- Not yet enough political interest in all relevant countries

Fast movers in the slow lane



- Future is for inland shipping as an integral part of a world wide logistical network

Let's work together !!!